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## India

**Post:** New Delhi

### India's Quick Service Restaurant Sector Growing

**Report Categories:**

Retail Foods

Food Service - Hotel Restaurant Institutional

Promotion Opportunities

**Approved By:**

David Williams

**Prepared By:**

Priya Jashnani

**Report Highlights:**

The first foreign quick service and casual dining restaurant brands entered the Indian market nearly 20 years ago. At the time, Indians rarely ate out and many wondered how the restaurants would overcome supply chain challenges and opposition to foreign investment. There are now an estimated 43 foreign restaurant brands operating 1,900 outlets across India. The number of home-grown chains is also rising as Indian firms adopt franchising or chain models to meet growing consumer demand for the dining-out experience. The rising number of restaurants does not present a significant opportunity for imported food products given relatively high tariffs and import restrictions on key products, but restaurants are introducing new cuisines and changing consumer tastes and preferences, a trend that could result in long-term opportunities for exporters. This report provides an estimated census of foreign and domestic casual and quick service restaurant brands operating in India.

## **Things Have Changed Over the Past 20 Years**

It has been nearly 20 years since the first foreign quick service and casual dining restaurant chains and franchises opened in India. The initial opening was met with a mixture of anti-globalization opposition and consumer curiosity regarding how the restaurants would adapt their menus and operations to the Indian market where many consumers are vegetarians or do not eat beef. At the time, imports of food products were effectively banned and restaurants had to develop supply chains, processing facilities and supplies of suitable ingredients. One large chain took nearly 20 years to fully develop its local supplies but is now sourcing all of its ingredients in India.

Foreign restaurant chains were also entering a market where consumers rarely ate out and few comparable Indian restaurant chains existed. There were no shopping malls and airport restaurants were few and far between. Some questioned whether restaurants would be able to deliver products that were sufficiently suited to the Indian palate and wallet to convince consumers to occasionally skip their “home-cooked” Indian food. Consumers also believed their home-cooked meals to be tastier and more hygienic than restaurant food. A number of foreign restaurants have made significant changes in their menus to cater to Indian tastes, developing a range of vegetarian products and Indian flavors at very competitive prices; while others have made only a few concessions to the Indian market in terms of flavors, menu items and pricing.

20 years on, the improved logistics management, supply chains and sourcing options that the pioneering restaurants spurred have helped others in the industry to enter the market and/or expand. At an estimated 1,900 outlets, the number of foreign brand quick service and casual dining restaurants is still relatively small and a few chains account for the bulk of restaurants. However, a number of new foreign quick service restaurant chains have established a presence over the past few years bringing the total to 43. In some cases, expansion has been slow; one recently-opened franchise closed several of its outlets reducing its presence to a single restaurant. Real estate costs are a major hurdle in India’s larger cities and restaurants still face challenges in sourcing adequate supplies of ingredients. Food inflation in India has also been persistently high for several years, squeezing margins in a price-sensitive market as GDP growth has slowed to a still-enviable annual rate of five percent.

Indian firms are also opening multiple restaurants, establishing franchise business models, and designing food court formats to adapt to malls and airports. While these firms face some of the same logistical challenges that foreign firms face in terms of sourcing and real estate costs, they generally have the benefit of experience in the market and lower cost structures. Some Indian firms are even taking their brands abroad, establishing outlets in Europe, Asia and the Middle East.

Compared to their elders, younger consumers are proving to be much more accepting of eating out and foreign brands. An estimated 60 percent of Indians are under the age of 30 and India is slowly becoming a more urban society. Younger consumers and a growing emphasis on convenience are fundamentals that suggest future growth in this sector.

High tariffs and import requirements that effectively prohibit or severely limit imports of several key products typically lead new restaurants to develop supplies locally rather than import food products from abroad. In general, expansion of this sector is not expected to lead to a significant increase in opportunities for imported foods over the next few years. Restaurants may have to import certain specialty items that are not available in India, at least until they can develop local supplies. Over the longer term, persistent inflation and continued economic growth may eventually lead to a relaxation of import requirements, resulting in improved opportunities for imported products in this sector. Despite the limited short-term opportunities for imported foods, restaurants are changing consumers' consumption patterns and exposing them to new products and cuisines, a trend that is expected to have broader effects on consumption habits and patterns and may lead to new opportunities for importers in the food retail sector.

This report attempts to catalogue the current foreign and Indian restaurant chains operating in India. Two lists follow, the first is a listing of international chains operating in India and the second is a listing of Indian restaurant chains. It is likely that certain restaurants have been overlooked, especially among the Indian restaurants, but the intent is to give readers a general overview of scale and breadth of the expansion in the quick service and casual dining sectors over the past 20 years.

## **1. INTERNATIONAL RESTAURANTS**

### **McDonalds (USA)**

<http://www.mcdonaldsindia.com/>

With over 250 outlets all across India, Hardcastle Restaurants runs McDonalds' operations in western and southern India, while McDonalds' restaurants in north and eastern India are managed by Connaught Plaza Restaurants Private Limited.

### **Kentucky Fried Chicken (USA), Pizza Hut (USA), Costa Coffee (UK), Swensen's (USA)**

<http://kfc.co.in/>

<http://www.pizzahut.co.in/>

<http://www.costacoffee.co.in/>

<http://www.swensens.com/>

<http://dil-rjcorp.com/>

Devyani International is the largest franchisee for Pizza Hut and KFC in India. It also has franchisee rights for Costa Coffee and Swensen's ice cream.

### **Kentucky Fried Chicken (USA), Tacobell (USA), Pizza Hut (USA)**

<http://www.tacobell.com/>

<http://www.yum.com/>

Yum Restaurants directly operates KFC, Pizza Hut and Taco Bell in India. There are about 200 KFCs, more than 170 Pizza Hut restaurants and two Taco Bell outlets in India.

**Dominos (USA), Dunkin Donuts (USA)**

<http://www.dominosin.com/>

<http://www.dunkindonuts.com/>

Jubilant Foodworks owns the exclusive franchise rights for Domino's Pizza in India, Nepal, Bangladesh and Sri Lanka and franchise rights for Dunkin' Donuts in India. The company runs 465 Domino's Pizza outlets in 105 cities of India, (as of March 31, 2012). Currently it has one Dunkin' Donuts outlet in Delhi.

**Papa John's (USA), Chili's (USA)**

<http://papajohnspizza.in/>

<http://www.chilis.com/>

Om Pizzas and Eats India has exclusive franchise for Papa John's Pizza in India with 35 pizza outlets in the country. They are also franchisees for Chili's in western and southern India.

**Subway (USA)**

<http://www.subway.co.in/>

Subway Systems India opened its first restaurant in 2001 in New Delhi and has 282 restaurants in 26 cities across India.

**Quiznos (USA)**

<http://www.quiznosindia.com/>

<http://www.subone.in/>

Sub-One Hospitality Services has the master franchisees rights for Quiznos and has eight outlets presently in India.

**Yogurberry (USA)**

<http://www.yogurberry.in/>

Synergy Group is the master franchisee of Yogurberry in India. Currently it has four outlets in India.

**TGI Friday's (USA)**

<http://www.tgifindia.com/>

Bistro Hospitality owns and operates TGI Friday's franchisees in India. Currently they have 12 outlets across India.

**Starbucks (USA)**

<http://www.starbucks.in/>

Launched in October 2012, Tata Starbucks is a 50-50 joint venture between Starbucks Coffee and Tata Global Beverages.

**Sbarro (USA)**

<http://sbarro.com/>

Upper Crust Foods has the master franchisee rights to develop and operate Sbarro restaurants. They currently have four outlets in Bangalore and three in Mumbai.

**Hard Rock Café (USA), California Pizza Kitchen (USA), Trader Vic's (USA), Pinkberry (USA)**

<http://www.hardrock.com/>

<http://www.cpk.com/>

<http://www.tradervics.com/>

<http://www.pinkberry.com/>

<http://www.jsmcop.in/>

JSM Corporation through its subsidiaries is the exclusive master franchisee for Hard Rock Café, California Pizza Kitchen, Trader Vic's and Pinkberry across India.

**The Coffee Bean & Tea Leaf (USA)**

<http://www.coffeebean.com/>

Franchised by Blue Foods, the Coffee Bean & Tea Leaf has 19 outlets across India.

**Baskin Robbins (USA)**

<http://www.baskinrobbinsindia.com/>

<http://www.gravissgroup.com/>

Baskin Robbins is operated by the Graviss Group.

**Gloria Jean's (Australia)**

<http://www.gloriajeanscoffees.com/>

Citymax India is part of the Dubai-based Landmark Group. It launched Australia-based Gloria Jean's Coffees in India in 2008 and now has 15 outlets.

**Café Pascucci (Italy)**

<http://www.pascucci.in/>

Madhura Beverages is the exclusive master franchisee for Café Pascucci in India and currently has one outlet in Bangalore with reported plans to set up 60 outlets across the country.

**Barista Lavazza (Italy)**

<http://www.barista.co.in/users/index.aspx>

Barista Lavazza is a chain of espresso coffee bars that operates around 200 outlets across India.

**Mad Over Donuts (Singapore)**

<http://www.madoverdonuts.com/>

Mad Over Donuts has 38 stores across India.

**Le Pain Quotidien (Belgium)**

<http://www.lepainquotidien.in/>

Franchised by Ahimsa Brands in India, Le Pain Quotidien has two outlets in Mumbai.

**Pizza Metro Pizza (UK)**

<http://pizzametropizza.com/>

Franchised by Good Karma Hospitality in India, Pizza Metro Pizza was launched in Mumbai in November 2012.

**Costa Coffee (UK)**

<http://www.costa.co.uk/>

Devyani International is the franchisee with 95 locations.

**Breadtalk (Singapore)**

<http://www.breadtalkindia.com/>

M/s Crustum Products is the master franchisee of Breadtalk. The company is running five outlets in malls in Mumbai, Bangalore and Hyderabad.

**Chicking (UAE)**

<http://www.chickingindia.in/>

Owned and operated by the UAE-based Al Bayan Group of Companies, Chicking has 26 outlets across southern India.

**Leonidas Chocolates (Belgium)**

<http://www.leonidasindia.com/contact.html>

Owned by Premium Pralines Mumbai, Leonidas has two boutiques in Mumbai.

**Di Bella Coffee (Australia)**

<http://www.dibellacoffee.in/>

The company has 10 outlets in Mumbai and two in Hyderabad.

**Chocolateria San Churro (Australia)**

<http://www.sanchurro.in/>

San Churro has three outlets in Maharashtra, one in Delhi and one in Gujarat.

**Marrybrown (Malaysia)**

<http://www.marrybrownindia.com/>

Marrybrown has 37 outlets across southern India.

**Cinnabon (USA)**

<http://www.cinnabon.com>

Franchised by SNZ Concepts, they currently have one outlet in New Delhi.

**Patchi (Lebanese)**

<http://www.patchi.com>

Patchi India has two outlets in Mumbai and one in Delhi.

**Manhattan Pizza and Luv'nberry Frozen Yogurt (USA)**

[www.manhattannypizza.com/](http://www.manhattannypizza.com/)

Kottam Foods of Hyderabad is the master franchisee and recently opened the first outlet in Bangalore.

**Wetzel's Pretzels (USA)**

<http://www.wetzelsindia.com/>

Wetzel's Pretzels has one outlet in Bangalore and two in Delhi.

**Smoothie Factory (USA)**

<http://smoothiefactoryindia.com/>

Smoothie Factory currently has one outlet in Delhi.

**Lemp Brewpub & Kitchen (USA)**

<http://lempbrewpub.com/>

Kaviar Hospitality has opened its first microbrewery franchise in Gurgaon outside of New Delhi.

**Ci Gusta! (Italy)**

<http://www.cigusta.com/>

Italy-based Happy Times Solutions, owner of Ci Gusta! in a joint agreement with Franchise India operates two outlets in Mumbai..

**Eagle Boys Pizza (Australia)**

<http://www.eagleboys.co.in/>

Franchised by Krsna Foods, Eagle Boys Pizza has five outlets in New Delhi.

**Japengo Café (UAE)**

[www.binhendi.com](http://www.binhendi.com)

Owned by Bin Hendi Hospitality of Dubai, Japengo has one franchised outlet in Mumbai.

**2. INDIAN RESTAURANTS****Javagreen**

<http://java-green.com/about.htm>

Javagreen is an Indian chain of in-store cafes started by the Reliance Group in 2003. With over 100 cafes, Javagreen is now operational across 10 cities.

**Café Mocha**

<http://www.mocha.co.in/>

Café Mocha opened its doors in Mumbai in December 2001. With 19 outlets across the country and its own central kitchen, Mocha has developed a reputation in providing a unique menu along with a Mediterranean look catering to the younger generation.

**Brewberrys Café**

<http://www.brewberrys.com/>

Brewberrys opened in 2008 in Gujarat and has 27 stores across India.

### **Coffee N U**

<http://www.coffeenu.com/>

With the first Coffee N U outlet in operation since 2008 in Bangalore, they now have 35 outlets.

### **BRU World Café**

Hindustan Unilever has extended its coffee brand BRU to a café chain, the BRU World Café. The chain currently has six outlets across Mumbai.

### **Cuppa Joe**

Cuppa Joe is an independent café launched by Umbrella Hospitality April 2012 in Mumbai.

### **Bangs Fried Chicken**

<http://www.bangsindia.com/>

Established in Chennai in 2009, Bangs India operates 31 outlets across 10 states in India.

### **Coffee World, Cream & Fudge Ice Cream, Pizza Corner, The Donut Baker**

<http://www.coffeeworld.com/>

<http://www.creamandfudge.com/>

<http://www.pizzacorner.com/>

<http://www.thedonutbaker.com/>

<http://www.gfacorp.com/>

In India the GFA Corporation operates four specialty food brands - Pizza Corner, Coffee World, The Donut Baker & The Cream & Fudge Factory. The first Pizza Corner outlet was started in 1996 at Chennai and the brand currently has 45 stores across India. Coffee World has 5 outlets across Bangalore, Hyderabad, and Chennai while The Donut Baker has 8 outlets across Bangalore. The Cream & Fudge Factory has 4 outlets across Bangalore and has recently launched one store in Hyderabad.

### **US Pizza**

<http://www.uspizza.in/>

Owned by United Restaurants, the company has 90 US Pizza outlets in 34 cities and 12 states.

### **Smokin' Joes**

<http://www.smokinjoespizza.com/>

Smokin' Joes has 52 outlets across India.

### **Garcia's Famous Pizza**

Established in 2004 in Mumbai, Garcia's has 20 outlets across India.

### **Slice of Italy**

<http://www.sliceofitaly.com/>

Founded in 2001, Green House & Hestoft Foods has 17 Slice of Italy restaurants in the Delhi area.

### **Barista**



<http://www.barista.co.in/>

Established in 2000 in New Delhi, the Barista Coffee Company has over 200 Barista Lavazza Espresso Bars and Barista Lavazza Crèmes in over 30 cities across India.

### **Café Coffee Day**

<http://www.cafecoffeeday.com/>

Owned and operated by Amalgamated Bean Coffee Trading Co., Café Coffee Day opened its first outlet in 1996 and has over 1,200 cafes across India.

### **Kent's Fast Food**

<http://www.kentsfastfood.com/>

Established in 1985, Kent's fast food has 15 outlets in New Delhi.

### **Yo! China**

<http://www.yo-china.com/>

Yo! China is a trademark owned and operated by Moods Hospitality. It has 50 restaurants and delivery outlets across 14 cities in India.

### **Dosa Plaza**

<http://www.dosaplaza.com/>

Established in 1998, Dosa Plaza presently has 23 outlets in nine states.

### **Jumboking**

<http://www.jumboking.co.in/>

Established in 2001, Jumboking sells India's famous snack food -- vada pav. It has 15 outlets in Mumbai.

### **Kaati Zone**

<http://www.kaatizone.com/>

The Kaati Zone is owned by East West Ethnic Foods and has 31 outlets across India.

### **Nirula's**

<http://www.nirulas.com/>

Established in New Delhi in 1934, Nirula's Corner House operates 85 restaurants across northern and central India under the brand name Nirula's.

### **Kailash Parbat**

<http://www.kailashparbatandheri.com/>

Established in 1952, Kailash Parbat Restaurants has restaurants in a number of countries including India.

### **Haldiram's**

<http://www.haldiram.com/>

Haldiram's was established in Bikaner in 1937, it has 18 outlets in India.

### **Bikanervala & Bikano Chat Café**

<http://www.bikanervala.com/>

Bikanervala has 26 outlets in India with a major presence in New Delhi.

### **Sagar Ratna**

<http://www.sagarratna.in/>

Established in New Delhi in 1986, Sagar Ratna has 59 outlets of which 37 are franchised and others are company-owned.

### **Tibbs Frankie**

Established during the 1970s in Mumbai, there are a number of Tibbs Frankie outlets in Mumbai and Pune.

### **Vaango**

<http://vaango.in/>

<http://dil-rjcorp.com/>

Devyani International is the largest franchisee for Pizza Hut and KFC in India. It also has Pan India franchisee rights for Costa Coffee and Swensen's Ice creams. Vaango is its own brand of South Indian food.

### **Café Mangii; Khandani Rajdhani; Manchester United Café Bar and Restaurant; Falafel**

<http://www.cafemangii.com/>

<http://www.rajdhani.co.in/>

<http://www.falafels.in/>

<http://www.mirahgroup.in/>

Mirah Group runs several restaurant brands such as Café Mangii (serving pizzas and pastas), Nouvelle (institutional catering services), Palette (food court brand serving all cuisines), Khandani Rajdhani an Indian restaurant with 30 outlets in 19 cities, Manchester United Café Bar and Restaurant (three outlets in Mumbai and one in Goa), and the Mediterranean-Lebanese chain Falafel (nine outlets in Mumbai).

### **Spaghetti Kitchen; Copper Chimney; Gelato Italiano; China Town by Noodle Bar; Bombay Blue**

<http://www.copperchimney.in/>

<http://www.coffeebean.com/>

<http://www.blue-foods.com/>

Blue Foods operates over 100 outlets across the country through a mix of owned and franchise operations. Restaurants include Spaghetti Kitchen, Copper Chimney, Gelato Italiano, China Town by Noodle Bar, and Bombay Blue. It also operates the food court formats Food Talk and Spoon and The Coffee Bean & Tea Leaf.

### **Café Basilico Bistro & Deli**

<http://www.cafebasilico.com/>

Owned by Infinity Hotels, Café Basilico has two outlets in Mumbai with plans to open another outlet in Goa.

### **Café Moshe's**

<http://moshes.in/>

Mumbai-based and owned by Chef Moshe Chek, Café Moshe's has nine outlets in Mumbai serving

continental cuisine. The café also makes and sells its own brand of condiments, jams, breads, dips and desserts.

### **Punjab Grill**

<http://www.punjabgrill.in/>

Owned by Lite Bite Foods, there are Punjab Grill restaurants in Singapore, Bangalore, Delhi, Mumbai, Gurgaon, Pune and Chandigarh.

### **Moti Mahal**

<http://motimahalandia.com/>

The Moti Mahal group has restaurants across India, the United Arab Emirates and United Kingdom.

### **Goli Vada Pav No. 1**

<http://www.golivadapav.com/>

Head quartered in Mumbai, Goli Vada Pav operates over 150 stores in 40 cities.

### **Cookie Man**

<http://www.cookieamanindia.com/>

Cookie Man launched in India in January 2000 by Australian Foods and operates 43 outlets in 17 cities.

### **Cocoberry**

<http://www.cocoberry.co.in/>

Cocoberry has 30 outlets across six cities.

### **The Great Kabab Factory**

<http://www.thegreatkababfactory.com/india.html>

### **Shiro (India)**

<http://www.shiro.co.in/>

<http://www.jsmcop.in/>

Owned by JSM Corporation, they have one outlet in Mumbai, one in Delhi and one in Bangalore.

### **Daily Bread**

<http://www.dailybread.co.in/>

Daily Bread has over 20 stores spread across four cities in India

### **Mr. Idli Red Curry Hospitality**

<http://www.mridli.com/>

Mr. Idli has 21 outlets across India.

### **Mr, and Mrs. Idly**

<http://www.mrandmrsidly.com/>

Mr & Mrs Idly has outlets in eight cities in India. They also own Incy Wincy Spider ice cream outlets in India.

**Juice Lounge**

<http://www.juicelounge.in/>

Founded in 2005, Juice Lounge has several outlets spread over 25 cities in India

**Panchavati Gaurav**

<http://www.panchavatihotels.com/restaurant.html>

Panchavati Gaurav has nine restaurants across five cities in India.

**Dosa Plaza**

<http://www.dosaplaza.com/>

Dosa Plaza has 37 outlets across India with three outlets in Dubai and three in New Zealand. The master franchise of the Dosa Plaza in Kerala is undertaken by R&J Ventures.

**Mumbai Tawa – Just Tawalecious™**

<http://www.mumbaitawa.com>

Mumbai Tawa has four outlets in Mumbai.

**Minus 4**

<http://www.minus4.com/>

Minus 4 ice creams have five outlets in southern India.

**3H Kitchen**

<http://www.3hfoods.com/>

Founded in 2010, 3H Kitchen servers Indian, Chinese and Tandoori cuisines with five outlets in New Delhi.

**Tikka Town**

<http://www.tikkatown.com/>

Owned by Old World Hospitality, Tikka Town has outlets in Delhi and Lavasa

**Café Buddy's**

<http://www.cafebuddys.com/>

Café Buddy's serves continental and Indian ethnic fast food and operates 100 outlets in Delhi.

**Fusion Lounge**

<http://www.fusionlounge.co.in/>

Owned by Bangalore-based Siddi Entertainment, Fusion Lounge has three outlets, two of which are company owned and one is franchised.

**Cream Center**

<http://creamcentre.com/>

Owned by Prince Cuisines, Cream Center has 23 outlets spread across India.

**Hokey Pokey**

<http://www.hokeypokey.in/>

Owned by Drums Food International (DFIPL), has 14 company owned outlets in Mumbai, Pune, Ahmedabad, Surat and Bangalore.

**The Yellow Chilli**

<http://www.theyellowchilli.com/>

Owned by chef Sanjeev Kapoor, the Yellow Chilli has 20 outlets across India.

**Cuppa**

<http://www.cuppastop.com>

Owned by Concorde Cuppa Bangalore, Cuppa has 11 owned outlets and 22 franchised outlets with a major presence in Bangalore.

**The Pasta Bar Veneto**

<http://www.thepastabarveneto.com/about.html>

The Pasta Bar Veneto is a chain of Italian Cafe Restaurants, belonging to Fifth Avenue Hotels & Resorts with three outlets in Chennai, one in Puducherry, one in Coimbatore and one in Ludhiana.

**Crepeteria**

<http://www.crepeteria.in/>

Owned by Altius Enterprises Crepeteria has six company-owned outlets and two franchised.

**South Indies**

<http://thesouthindies.com/>

South Indies has two restaurants in Bangalore and one in Pune.

**Little Italy**

<http://littleitaly.in/>

Little Italy has 26 outlets across 17 major cities in India.

**Café Oz & Bar**

<http://cafeozindia.com/>

Owned by Newport Coffee Co., Café Oz & Bar has five outlets in five cities.

**Incy Wincy Spider**

<http://incywincyspider.in/>

A unit of South Indian Food, Mr & Mrs Idly, has eight franchised outlets in India.

**The Chocolate Heaven**

<http://thechocolateheaven.com/>

The Chocolate Heaven has eight franchised outlets in six cities.

**Maroosh****Da Vinci****Two one Two Café**

<http://www.ihmpl.in/>

Impresa Hospitality Management owns stand-alone restaurants Maroosh (Lebanese ); Da Vinci (Italian) and Two one Two Cafes and Two one Two Bar & Grill (International) all in Mumbai.

### **Grillopolis**

Grillopolis has two restaurants in Mumbai

### **Rain Forest Resto-Bar**

Rain Forest Resto-Bar has three restaurants in Mumbai

### **Wraps & Rolls**

<http://www.wrapsandrolls.com/>

Wraps and Rolls has several outlets spread across six cities in India.

### **Café Chokolade**

<http://www.cafechokolade.com/>

Has both company-owned and franchised restaurants totaling 110 outlets across 14 states.

### **Zaffran Restaurant**

<http://www.zaffranrestaurant.com/>

Zaffran has six branches across Mumbai and one in Bangalore.

### **New York Pizza and Fried Chicken (NYPFC)**

#### **American Fried Chicken (AFC)**

<http://venustradings.com>

Owned by Venus Trading, NYPFC has 16 operational outlets across India and two AFC outlets in southern India.